



OCREB Online User Guide: Adding or Removing Study Personnel - “Edit Study Personnel”

Version 1.0

For Study Staff including Study Coordinators
and Principal Investigators

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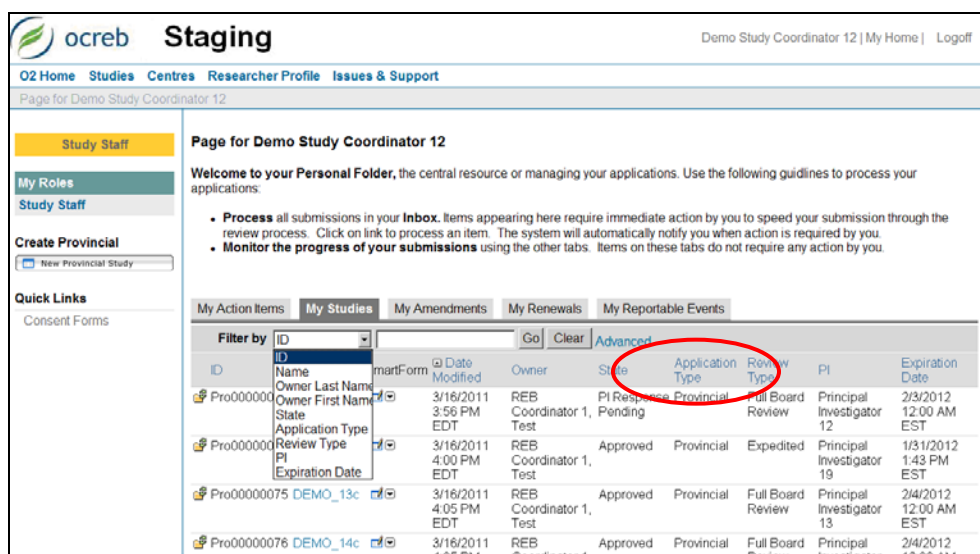
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Edit Study Personnel

Study personnel now can add or remove other study personnel from applications as appropriate. This includes adding or removing co-investigators/subinvestigators. It does NOT include changing the Principal Investigator (PI) or Provincial Applicant (PA). Changing a PI or PA must be done through an amendment. To add or remove study personnel from an application form (provincial and/or centre), locate the study, open the study workspace and select the **Edit Study Personnel** activity.

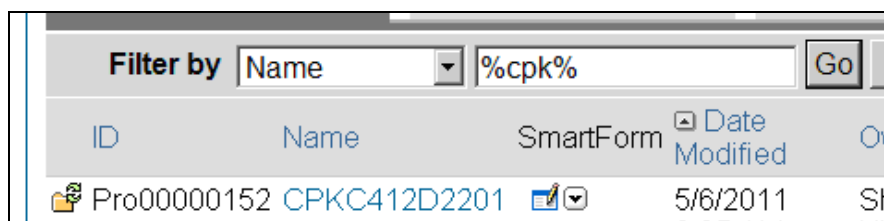
1. Locate the Study (Option 1)

To find the study, from **My Home** page, select the **My Studies** tab. Sort the “Name” column (i.e., sponsor protocol number) in ascending or descending order, or enter the protocol number in the **Filter by** “Name” field, and press **Go**. (The OCREB # is not displayed in this view yet). Click on “Name” to open the study workspace. Be sure to select the appropriate application type: “Centre” or “Provincial”.



ID	Name	SmartForm	Date Modified	Owner	Status	Application Type	Review Type	PI	Expiration Date
Pro000000	Owner Last Name		3/16/2011 3:56 PM EDT	REB Coordinator 1, Test	PI Response Pending	Provincial	Full Board Review	Principal Investigator 12	2/3/2012 12:00 AM EST
Pro000000	Owner First Name		3/16/2011 4:00 PM EDT	REB Coordinator 1, Test	Approved	Provincial	Expedited	Principal Investigator 19	1/31/2012 1:43 PM EST
Pro00000075	DEMO_13c		3/16/2011 4:05 PM EDT	REB Coordinator 1, Test	Approved	Provincial	Full Board Review	Principal Investigator 13	2/4/2012 12:00 AM EST
Pro00000076	DEMO_14c		3/16/2011 4:05 PM EDT	REB Coordinator 1, Test	Approved	Provincial	Full Board Review	Principal Investigator 13	2/4/2012 12:00 AM EST

Note. Filter with only a portion of the sponsor’s protocol number by using the percent symbol (%) before and/or after. For example, to find study CPKC412D2201, **Filter by** “Name” and type %cpk% in the adjacent field and press **Go**. This will bring up any studies with “cpk” in the sponsor protocol number.



ID	Name	SmartForm	Date Modified	Owner
Pro000000152	CPKC412D2201		5/6/2011 3:56 PM EDT	Sh...

2. Locate the Study (Option 2)

To find your study from the Studies page, select **Studies** from the top blue navigation bar. The Studies page displays a list of all studies in which you are involved, with Provincial studies listed in the top portion of the page and the Centre studies list starting in the middle of the page. From the appropriate list (Provincial or Centre), **Filter by** “Name” or OCREB #, and press **Go**. If a study appears in the

Centre – All Studies list more than once, be sure you select your centre (check for the correct PI name). Click “Name” (which is the sponsor protocol number) to open the study workspace.

Other Submission Types

- Amendments
- Renewals
- Reportable Events

Create Provincial

New Provincial Study

Studies

View all studies by **In Progress**, **Approved**, and **Closed** groupings. Use the 'My Home' link in the top right-hand corner of your screen to see the list of **submissions** related to you.

Provincial - All Studies Provincial - In Progress Provincial - Approved Provincial - Closed

Filter by ID [] Go Clear Advanced

ID	Name	SmartForm	Date Modified	Owner	State	OCREB #	Acronym	Review Type	Provincial PI
Pro00000058	DEMO_12b		3/16/2011 3:56 PM EDT	REB Coordinator 1, Test	PI Response Pending	2011-12b	DEMO12b	Full Board Review	Principal I
Pro00000057	DEMO_19		3/16/2011 4:00 PM EDT	REB Coordinator 1, Test	Approved	2011-19	DEMO19	Expedited	Principal I
Pro00000075	DEMO_13c		3/16/2011 4:05 PM EDT	REB Coordinator 1, Test	Approved	2011-13c	DEMO13c	Full Board Review	Principal I
Pro00000076	DEMO_14c		3/16/2011 4:05 PM EDT	REB Coordinator 1, Test	Approved	2011-14c	DEMO14c	Full Board Review	Principal I
Pro00000073	DEMO_11c		3/16/2011 4:05 PM EDT	REB Coordinator 1, Test	Approved	2011-11c	DEMO11c	Full Board Review	Principal I
Pro00000077	DEMO_15c		3/16/2011 4:06 PM EDT	REB Coordinator 1, Test	Approved	2011-15c	DEMO15c	Full Board Review	Principal I
Pro00000027	DEMO_12a		3/16/2011 4:09 PM EDT	REB Coordinator 1, Test	Pre Submission	2011-12	DEMO12a	Full Board Review	Principal I
Pro00000074	DEMO_12c		8/23/2011 2:51 PM EDT	REB Coordinator 1, Test	Approved	2011-12c	DEMO12c	Full Board Review	Principal I

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Centre - All Studies Centre - In Progress Centre - Approved Centre - Closed

Filter by ID [] Go Clear Advanced

ID	Name	SmartForm	Date Modified	Owner	State	OCREB #	Acronym	Review Type	Centre PI
Pro00000087	DEMO_12c		8/24/2011 9:21 PM EDT	REB Coordinator 1, Test	Approved	2011-12c	DEMO12c	Full Board Review	Principal Inves

3. Change the Study Personnel

From the study workspace, click **Edit Study Personnel** under **My Activities**.

O2 Home Studies Centres Researcher Profile Issues & Support

Studies > DEMO_1c > DEMO_1c

Approved

View Application

Printer Version

View Differences

My Activities

Edit Email List

Send Email to REB Staff

Edit Study Personnel

New Reportable Event

New Amendment

New Continuing Review

(Approved)

Project Information Centres Latest Submissions Study Staff

Centre Study - Demo Centre 1

DEMO_1c (Pro00000012) OCREB #: 2011-1c

Acronym: DEMO1c

Full Title: This is the full title for test study DEMO_1c.

Principal Investigator: Demo Principal Investigator 1 **Study Coordinator:** Demo S

OCREB Coordinator: Test REB Coordinator 1 **Review Type:** Study

Expiration Date: 26-Jan-2012 **Meeting Date & Time:**

Approval Date: 27-Jan-2011 **Approval Letter:** View

Sponsor:

History Amendments Continuing Reviews Reportable Events Attachments Lette

Activity	Author	Activity
Reportable Event Opened	Study Coordinator 1, Demo	11/14/201

View Reportable Event workspace

An **Edit Study Personnel** window will appear.

To add new study personnel, select **Add** from the appropriate section:

“...that require edit rights”;

“...that require read-only rights”; or,

“...co-investigators that require access”

To remove study personnel currently listed in the application, select **Remove** beside the person’s name.

Selecting **Add** from the appropriate section will open up a list of names to choose from.

Select the appropriate name or names and click **OK**.

Click **OK** again to complete and close the **Edit Study Personnel** activity.



If you are removing or replacing yourself as the main study coordinator but still need access to the study, be sure to add yourself in the appropriate Study Staff section first, and then select the new (incoming) Study Coordinator/Main Study Contact who will replace you. Otherwise, you will remove your own access and will not be able to continue editing the application.